

## **TOWN OF DAVIE TOWN COUNCIL AGENDA REPORT**

**AGENDA DATE:** October 20, 2006

**TO:** Mayor and Council Members

**FROM/PHONE:** Mark Alan, Director of Human Resources Management (954) 797-1169

**PREPARED BY:** Mark Alan

**SUBJECT:** Resolution establishing and modifying job classification specifications

**AFFECTED DISTRICT:** Not Applicable

### **TITLE OF AGENDA ITEM:**

A RESOLUTION OF THE TOWN OF DAVIE, FLORIDA AUTHORIZING THE ESTABLISHMENT OF A JOB CLASSIFICATION TITLE, JOB CLASSIFICATION SPECIFICATION, AND SALARY RANGE FOR THE JOB CLASSIFICATION OF FINANCE AND BUDGET ANALYST; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

### **REPORT IN BRIEF:**

The subject item has been agendized under the consent agenda. The specified job classification was previously approved with the adoption of the Fiscal Year 2007 Budget. The adoption of this resolution will enact and formally establish title, specification/description, and salary range for the indicated job classification; and will establish an effective date which coincides with the initial date of Fiscal Year 2007.

The adoption of this resolution will have neither a current nor a future fiscal impact since no authorization for a salary range adjustment for this job classification is being sought.

The adoption of this resolution is necessary since pursuant to Personnel Rules and Regulations of the Town of Davie, Rule III, Section 7 and Rule IV, Section 2, new or revised job classification specifications and salary range adjustments will be submitted to the Town Council for approval.

The establishment of job classification titles and job classification specifications/descriptions is also necessary in order to accurately reflect the general statement of the job classification as well as specific duties and responsibilities, essential job functions, minimum requirements, and performance indicators for the specified job classification. The establishment of an associated salary range is necessary in order to appropriately compensate individuals employed in this job classification when competitive market conditions and internal equity issues are taken into consideration.

The following includes some of the factors considered during the analyses for the development and establishment of the job classification title, job classification specification, and salary range: 1) Job tasks (qualitatively/quantitatively); 2) Task significance, variability, and difficulty; 3) Knowledge/skill variety; 4) Level of autonomy; 5) Interaction (co-worker, supervisory); 6) Span of control; 7) Work unit size; 8) Size of organization.

**PREVIOUS ACTIONS:** Adoption of the Fiscal Year 2007 Budget containing the subject job classifications

**CONCURRENCES:** Not Applicable

**FISCAL IMPACT:** None

**RECOMMENDATIONS:** Staff recommends approval of the Resolution.

### **Attachment(s):**

- Resolution
- Exhibits A

cc: Ken Cohen, Acting Town Administrator  
Russell Muniz, Acting Assistant Town Administrator

RESOLUTION NO. \_\_\_\_\_

A RESOLUTION OF THE TOWN OF DAVIE, FLORIDA AUTHORIZING THE ESTABLISHMENT OF A JOB CLASSIFICATION TITLE, JOB CLASSIFICATION SPECIFICATION, AND SALARY RANGE FOR THE JOB CLASSIFICATION OF FINANCE AND BUDGET ANALYST; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Town of Davie has adopted the Fiscal Year 2007 Budget; and

WHEREAS, the job classification title, job classification specification, and salary range a job classification of one of the positions approved during the adoption of the Fiscal Year 2007 Budget must be added to the classification and compensation plan; and

WHEREAS, it is recommended that the classification and compensation plan be amended to enact and formally establish the job classification title, job classification specification, and salary range for said previously approved position; and

WHEREAS, it is in the best interest of the Town to enact said amendment to the classification and compensation plan.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF DAVIE, FLORIDA:

SECTION 1. The Town Council of the Town of Davie does hereby authorize the amendment of the Town of Davie classification and compensation plan effective on the first day of Fiscal Year 2007 by authorizing by authorizing the Finance and Budget Analyst job classification title and job classification specification herein incorporated as Exhibits A at Salary Range 524, \$59,659 to \$79,949, annually.

SECTION 2. If any section, subsection, sentence, clause, phrase, or portion of this Resolution is, for any reason, held invalid or unconstitutional by any court of competent jurisdiction, such portion shall be deemed a separate, distinct, and independent provision and such holding shall not affect the validity of the remaining portion of the Resolution.

SECTION 3. This resolution shall take effect immediately upon its passage and adoption.

PASSED AND ADOPTED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2006

\_\_\_\_\_  
MAYOR/COUNCILMEMBER

ATTEST:

\_\_\_\_\_  
TOWN CLERK

APPROVED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2006

**Job Classification Specification**

**Job Classification Title:**

**Finance and Budget Analyst**

**GENERAL STATEMENT OF JOB**

Works with faculty and administrative staff in the compilation of information related to expenditures and revenue budgets, including grants, contracts, endowments, general funds, revenues, and/or gift accounts. Assists in the development of budgets and budget projections. Provides up-to-date expenditure and balance information. Reviews and processes payroll and accounting transactions, verifies budgets and expenditures to ensure compliance with university and/or agency regulations and restrictions.

**ILLUSTRATIVE EXAMPLES OF WORK**

**Essential Job Functions:**

Assists in the development of all types of budgets, including general, discretionary accounts, endowments, private, and federal funds.

Using templates, analyzes budget patterns, projects expenditures, and prepares approved budget.

Using templates, collects and compiles budget data, completes work papers and status reports.

Assists in the development and maintenance of budget monitoring systems.

Assists in the development of business proposals.

Uses appropriate cost rates, such as indirect and benefit rates for proposed budgets. Reviews budget justification to ensure it relates to budgeted dollars. Confirms that anticipated promotions and other increases are calculated into the cost of project. Ensures compliance with all relevant university and/or agency regulations and restrictions.

Confers with appropriate internal and external administrative offices to ensure that required procedures are followed. Provides instruction and answers questions relating to budget procedures and serves as liaison between the business office and unit areas. Identifies budget issues, provides alternative solutions, and resolves problems.

Monitors and approves expenditures throughout the budgetary period.

Applies a working knowledge of applicable laws and regulations; verifies documents for completeness and compliance with government and private agencies.

Uses various software applications, such as spreadsheets, relational databases, statistical packages, and graphics packages to assemble, manipulate and/or format data and/or reports.

Performs other related duties

### Scope of Responsibility:

Knows the formal and informal departmental goals, standards, policies and procedures which may include some familiarity of other departments within the school/division. Is sensitive to the interrelationship of both people and functions within the department.

On a regular and continuous basis, exercises administrative judgment and assumes responsibility for decisions, consequences, and results having an impact on people, costs, and/or quality of service within the functional area.

### **MINIMUM TRAINING AND EXPERIENCE**

Bachelor's degree in Accounting, Finance, or business and a minimum of two (2) years progressively responsible experience in professional budgeting or accounting management functions that provides broad knowledge of budget administration issues, preferably for a governmental or similar public sector agency; or an equivalent combination of education, training, and experience which provides required knowledge, skills, and abilities. Master's Degree preferred. Proficiency in the use of software applications, databases, spreadsheets, and/or word processing required.

### **MINIMUM QUALIFICATIONS OR STANDARDS REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS**

**Physical Requirements:** Must be physically able to operate a variety of machines and equipment including vehicles, computer, basic office equipment, telephone/radio, etc. Must be able to exert up to twenty pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Physical demands are in excess of those for sedentary work; must be able to remain on feet for periods of time, stoop, kneel, crouch, crawl, push, and pull. Must be able to lift, position and/or carry weights of up to twenty-five pounds.

**Data Conception:** Requires the ability to compare and/or judge the readily observable functional, structural or compositional characteristics (whether similar to or divergent from obvious standards) of data, people or things.

**Interpersonal Communications:** Requires the ability of speaking and/or signaling people to convey or-exchange information. Includes receiving assignments and/or direction from supervisor.

**Language Ability:** Requires ability to read a variety of policy and procedure manuals, technical manuals, etc. Requires the ability to prepare routine reports, correspondence, etc. with proper format, punctuation, spelling and grammar, using all parts of speech. Requires the ability to speak with and before others with poise, voice control and confidence.

**Intelligence:** Requires the ability to apply principles of logical thinking to define problems, collect data, establish facts and draw valid conclusions; to deal with several abstract and concrete variables. Requires the ability to learn and understand relatively complex principles and techniques; to make independent judgments in absence of supervision; to acquire knowledge of topics related to primary occupation. Must have the ability to comprehend and interpret received information.

**Verbal Aptitude:** Requires the ability to record and deliver information, to explain procedures, to follow-verbal and written instructions. Must be able to communicate effectively and efficiently with co-workers, construction professionals and the general public.

**Numerical Aptitude:** Requires the ability to add and subtract totals, to multiply and divide, to utilize-mathematical formulas, to determine percentages and decimals and to determine time and weight. Must be able to use practical applications of algebra and statistics.

**Form/Spatial Aptitude:** Requires the ability to inspect items for proper length, width and shape, and visually read various information.

**Motor Coordination:** Requires the ability to coordinate hands and eyes using office and specialized-machinery, and to operate motor vehicles.

**Manual Dexterity:** Requires the ability to handle a variety of items, keyboards, office equipment, control-knobs, buttons, switches, catches, etc. Must have significant levels of eye/hand/foot coordination.

**Color Discrimination:** Does not require the ability to differentiate colors and shades of color.

**Interpersonal Temperament:** Requires the ability to deal with people beyond giving and receiving instructions. Must be adaptable to performing under stress when confronted with emergency situations or tight deadlines.

**Physical Communications:** Requires the ability to talk and hear: (talking: expressing or exchanging ideas by means of spoken words; hearing: perceiving nature of sounds by ear).

### **PERFORMANCE INDICATORS**

**Knowledge of Job:** Has thorough knowledge of the methods, procedures and policies of the Budget & Finance Department as they pertain to the performance of duties of the Finance Budget Analyst. Understands the role of the position in relation to entire operations. Has considerable knowledge of the functions and interrelationships of and other governmental agencies. Is knowledgeable in the laws, ordinances, standards and regulations pertaining to the specific duties and responsibilities of the position. Has knowledge in the areas of applicable Town codes and ordinances, etc. Is able to comprehend Budget and Finance Management issues and prepare related recommendations. Is able to perform duties under adverse environmental conditions such as excessive heat, cold, odors, smoke, dusts, noise, machinery hazards, and electric currents. Has knowledge of applicable occupational hazards and safety precautions. Has the ability to plan and develop daily, short and long term goals related to purposes. Has the ability to offer instruction and advice to co-workers and the public regarding departmental policies, methods and regulations. Is able to take the initiative to complete the duties of the position without the need of direct supervision. Has the ability to plan, organize and prioritize daily assignments and work activities. Has the ability to learn and utilize new skills and information to improve job performance and efficiency. Is able to read and interpret complex materials pertaining to the responsibilities of the job. Is able to assemble and analyze information and make written reports and records in a concise, clear and effective manner. Has comprehensive knowledge of the terminology and various professional languages used within the department. Is able to communicate in a firm and tactful manner with various agencies, members of the public, and departments and is persuasive in such communication. Knows how to make public presentations. Has the mathematical ability to handle required calculations. Has knowledge of modern office practices and technology. Has knowledge of the use of computers for data and word processing.

**Quality of Work:** Maintains high standards of accuracy in exercising duties and responsibilities. Exercises immediate remedial action to correct any quality deficiencies that occur in areas of responsibility. Maintains high quality communication and interaction with internal and external entities with whom the position interacts.

**Quantity of Work:** Performs described Essential Functions and related assignments efficiently and effectively in order to produce quantity of work which consistently meets established standards and expectations.

**Dependability:** Assumes responsibility for completing assigned work. Completes assigned work within deadlines in accordance with directives, policy, standards and prescribed procedures. Maintains accountability for assigned responsibilities in the technical, human and conceptual areas.

**Attendance:** Attends and remains at work regularly and adheres to policies and procedures regarding absenteeism and tardiness. Provides adequate notice to supervisor with respect to vacation time and leave requests.

**Initiative and Enthusiasm:** Maintains an enthusiastic, self-reliant and self-starting approach to meet job responsibilities and accountabilities. Strives to anticipate work to be accomplished, and initiates proper and acceptable action for the completion of work with a minimum of supervision and instruction.

**Judgment:** Exercises analytical judgment in areas of responsibility. Identifies issues or situations as they occur and specifies decision objectives. Identifies or assists in identifying alternative solutions to issues or situations. Implements decisions in accordance with prescribed and effective policies and procedures and with a minimum of errors. Seeks expert or experienced advice where appropriate and researches issues, situations and alternatives before exercising judgment.

**Cooperation:** Accepts supervisory instruction and direction and strives to meet the goals and objectives of same. Questions such instruction and direction when clarification of results or consequences are justified, i.e., poor communications, variance with established policies or procedures, etc. Offers suggestions and recommendations to encourage and improve cooperation intra and inter-departmentally.

**Relationships with Others:** Shares knowledge with managers, supervisors and co-workers for mutual benefit. Contributes to maintaining high morale among all employees. Develops and maintains cooperative and courteous relationships intra and inter-departmental, and with external entities with whom the position interacts. Tactfully and effectively handles requests,

suggestions and complaints in order to establish and maintain good will. Emphasizes the importance of maintaining a positive image.

**Coordination of Work:** Plans and organizes daily work routine. Establishes priorities for the completion of work in accordance with sound time management methodology. Avoids duplication of effort. Estimates expected time of completion of work elements and establishes a personal schedule accordingly. Attends required meetings, planning sessions and discussions on time. Implements work activity in accordance with priorities and estimated schedules.

**Safety and Housekeeping:** Adheres to all established safety and housekeeping standards. Ensures such standards are not violated.

**Planning:** Plans, directs and uses information effectively in order to enhance activities and production of the department. Knows and understands the expectations of the Town regarding the activities of the division and works to see that these expectations are met. Designs and formulates ways, means and timing to achieve the goals and objectives of the department and the division. Within the constraints of Town policy, formulates the appropriate strategy and tactics for achieving division and departmental objectives. Organizes, arranges and allocates manpower, financial and other designated resources in an efficient and effective way so as to achieve the goals and objectives of the division and department.

**Organizing:** Organizes the work of subordinate staff. Ensures that staff members know what results are expected of them and that they are regularly and appropriately informed of all Town and department matters affecting them and/or of concern to them.

**Staffing:** Works with other department officials and management to select and recommend employment of personnel for the division who are qualified both technically and philosophically to meet the needs of the division and the department. Personally directs the development and training of division personnel in order to ensure that they are properly inducted, oriented and trained.

**Leading:** Provides a work environment which encourages clear and open communications. Has a clear and comprehensive understanding of the principles of effective leadership and how such principles are to be applied. Provides adequate feedback to staff so that they know whether their performance levels are satisfactory. Commends and rewards employees for outstanding performance yet does not hesitate to take disciplinary action when necessary. Exercises enthusiasm in influencing and guiding others toward the achievement of department goals and objectives.

**Controlling:** Provides a work environment which is orderly and controlled. Coordinates, audits and controls manpower and financial resources efficiently and effectively. Coordinates, audits and controls the utilization of materials and equipment efficiently and effectively. Has a clear and comprehensive understanding of Town standards, methods and procedures.

**Delegating:** Assigns additional duties to staff as necessary and/or appropriate in order to meet division goals, enhance staff abilities, build confidence on the job and assist staff members in personal growth. Has confidence in staff to meet new or additional expectations.

**Decision Making:** Uses discretion and judgment in developing and implementing courses of action affecting the division. When a particular policy, procedure or strategy does not appear to be achieving the desired result, moves decisively and definitively to develop and implement alternatives.

**Creativity:** Regularly seeks new and improved methodologies, policies and procedures for enhancing the effectiveness of the division and the department. Employs imagination and creativity in the application of duties and responsibilities. Is not averse to change.

**Human Relations:** Strives to develop and maintain good rapport with all staff members. Listens to and considers suggestions and complaints and responds appropriately. Maintains the respect and loyalty of staff.

**Policy Implementation:** Has a clear and comprehensive understanding of Town policies regarding the division, department and Town function. Adheres to those policies in the discharge of duties and responsibilities and ensures the same from subordinate staff.

**Policy Formulation:** Keeps abreast of changes in operating philosophies and policies of the Town and continually reviews division policies in order to ensure that any changes in Town philosophy or practice are appropriately incorporated. Also understands the relationship between operating policies and practices and department morale and performance. Works to see that established policies enhance same.